Autotask Integration
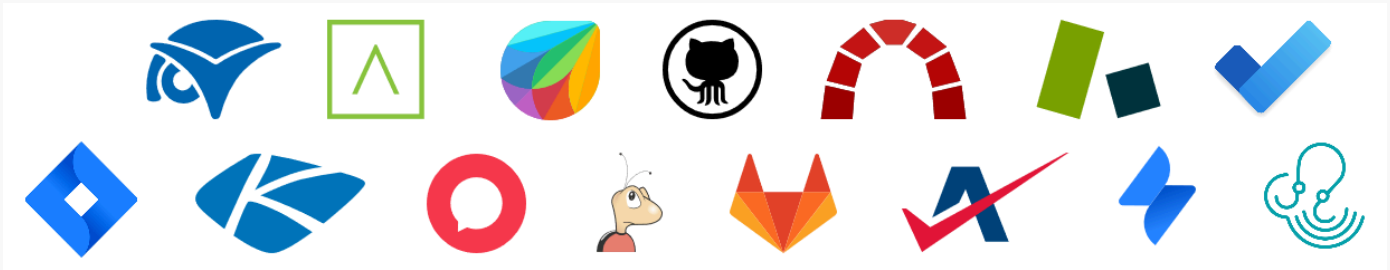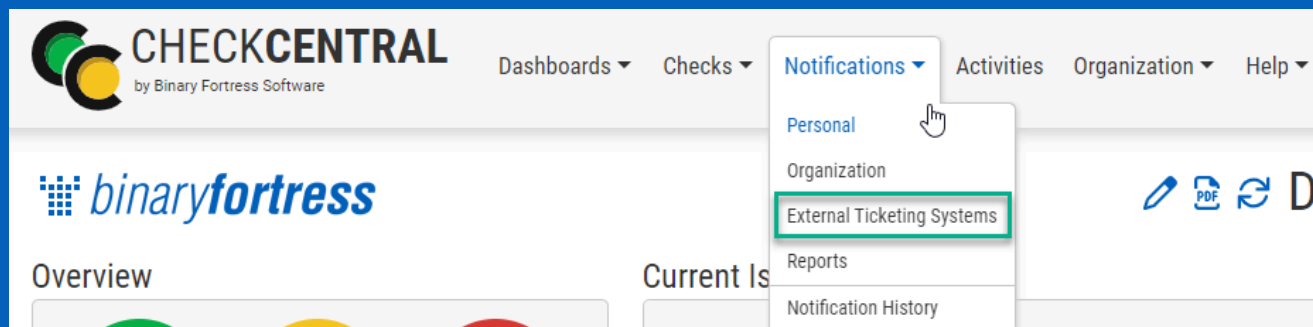
Autotask Integration

CheckCentral integrates with several RMMs, PSAs, and ticketing software, including Autotask, helping you consolidate service ticket issues.
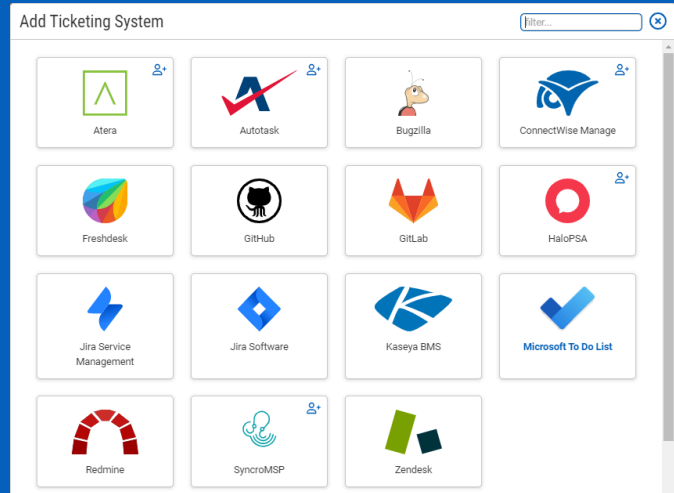
To integrate Autotask with CheckCentral, begin by logging into your CheckCentral account.

CheckCentral

From the main menu, click Notifications, then External Ticketing Systems.

Click Add Ticketing System and choose Autotask.

This will bring up the configuration options required for CheckCentral to communicate with Autotask servers via the API.
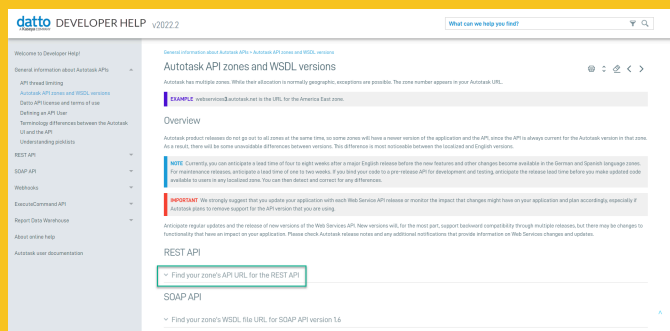

You can name this configuration anything you'd like.

The other details require you to log into your Autotask account.

Browser

Visit the **Autotask API Zones** page to lookup your API server URL.

Expand the 'Find your zone's API URL for the REST API' section.

If you are unsure of which zone you're in you can try looking at the URL you use to access Autotask. For example, if your URL starts with ww2.autotask.net you might also be in the zone that connects to webservices2.autotask.net.

Browser and CheckCentral

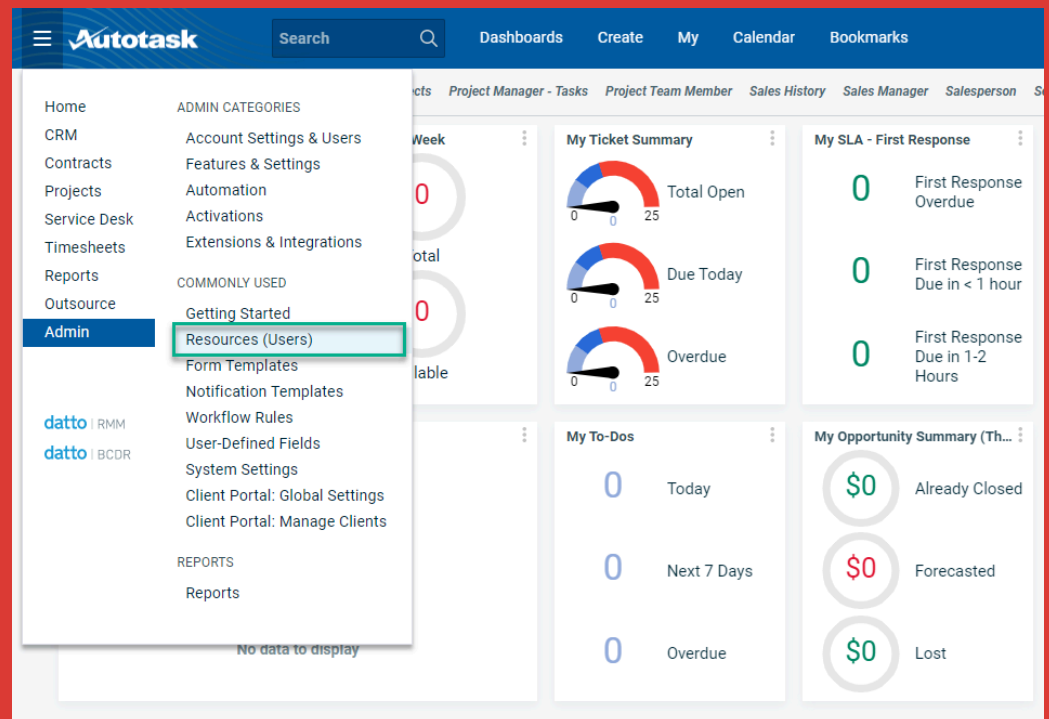Copy the URL for your zone.
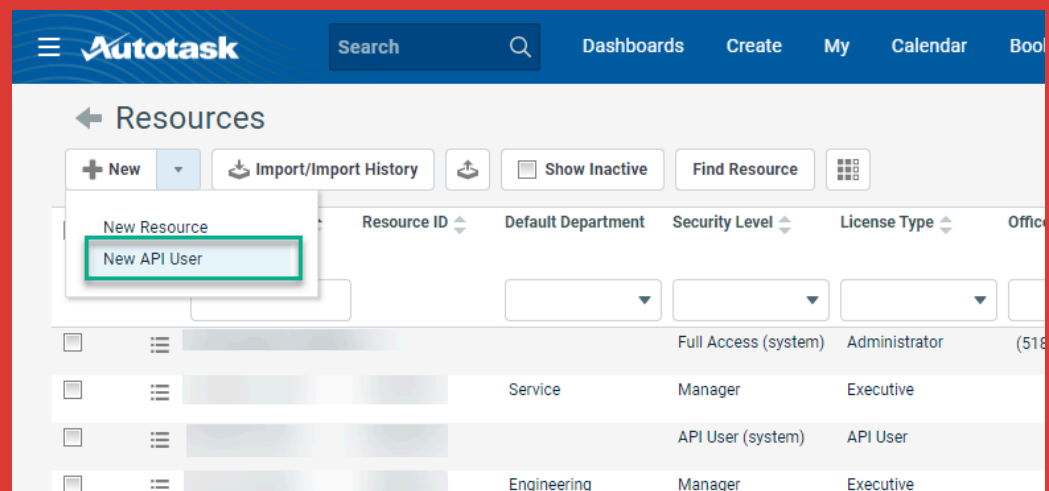
Paste the URL into the API Server URL field.

Autotask

The remaining information is in Autotask's Resources area.

From the Autotask portal main menu, click Admin > Resources (Users).

Hover on the arrow by "+ New" and click "New API User."

In the Add API User prompt, fill in the General section.

Add API User

Save & Close   Cancel   Review Terms and Conditions for API Use

General

First Name *
Matt

Last Name *
Sully

Email Address *
msully@binaryfortress.com

☑ Active
☐ Locked

Security Level *
API User (system)

Date Format
MM/dd/yyyy

Time Format
hh:mm a

Number Format
X,XXX.XX

Primary Internal Location *
Headquarters

Autotask and CheckCentral

In Autotask, click the "Generate Key" button and paste the "Username (Key)" in CheckCentral's "API Username (Key)" field.

Credentials

Generate Key   Generate Secret

Username (Key) *   Password (Secret) *
dfdk4rpspmn

Autotask

Name   Autotask

API Server URL   https://webservices2.autotask.net/atservicesrest

Visit *this page* to lookup your API server URL.
Expand the *'Find your zone's API URL for the REST API'* section and copy the URL for your zone.
If you are unsure of which zone you're in you can try looking at the URL you use to access Autotask. For example, if your URL
starts with ww2.autotask.net you might also be in the zone that connects to webservices2.autotask.net.

API Username (Key)   dfdk4rpspr

Open the menu in the top-left corner then browse to *'Admin > Resources (Users)'*.
Hover over the *'New'* button and click on *'New API User'*.
Complete the new api user form.
Click the *'Generate Key'* button and paste the username (key) in the *'API Username'* field here.
Click the *'Generate Secret'* button and paste the password (secret) in the *'API Secret'* field below.
In the *'API Tracking Identifier'* section choose *'Custom (internal integration)'* and give it a name.
Copy the *'Tracking Identifier'* value and paste it here in the *'Tracking Identifier'* below.
Click the *'Save & Close'* button to save your API user once you have copied the 3 values.

API Password (Secret)   7s*P@Cz8q~9GAe$5f#1RNc*3k

Follow the instructions for the *'API Username'* to get this value.

API Tracking Identifier

Follow the instructions for the *'API Username'* to get this value.

Click the "Generate Secret" button and paste the "Password (Secret)" in CheckCentral's "API Password (Secret)" field.

In the API Tracking Identifier section, select "Custom (Internal Integration)." Enter a name for the identifier in the "Internal Integration Name" field. Copy the Tracking Identifier and paste it into CheckCentral's "API Tracking Identifier" field.

Click "Save & Close" on Autotask's Add API User prompt.

Add API User

💾 Save & Close   ⊗ Cancel

Review Terms and Conditions for API Use

General

First Name *
Matt

Last Name *
Sully

Email Address *
msully@binaryfortress.com

☑ Active
☐ Locked

Security Level *
API User (system) ▾

Date Format
MM/dd/yyyy ▾

Time Format
hh:mm a ▾

Number Format
X,XXX.XX ▾

Primary Internal Location *
Headquarters ▾

CheckCentral

Return to the CheckCentral configuration window to finish.

Enter a number of days for the due date applied to newly created tickets.

Autotask ⊗

Due Date (days)	5 days	
	The ticket due date as the number of days from the creation date.	
Status	Search	
Priority	Search	
Account	Search Clear	
	Only accounts that have the 'Customer' type will be available to use.	
Resource	Search Clear	
Role	Search Clear	
	Role requires a resource to be selected first.	
Queue	Search Clear	
	If a resource is selected this will shown queues that belong to that resource only.	
Category	Search Clear	
Check Groups	☑ All Check Groups	

select an item (optional)   ☑ ⬚

Select check groups to use with this channel.

☑ Enable this external ticketing system

Save

Select the ticket Status, and Priority that will be associated with newly created tickets in Autotask. Click on the Search button to bring up relevant lists and choose one from each list.

For accounts/customers, you can select a specific account from the list or set the channel to automatically select the account based on the Check Group name.

Select the Resource, Role, Queue, and Category to be used with the Autotask tickets.

Finally, choose which Check Groups will use this Autotask ticketing channel. By default, all check groups are selected. To be more selective, disable the All Check Groups checkbox then use the multi-select dropdown field below. Once you've selected your check groups, ensure the 'Enable this external ticketing system' checkbox is enabled, and click Save.

CHECKCENTRAL
by Binary Fortress Software

Dashboards ▾   Checks ▾   Notifications ▾   Activities   Organization ▾   Help ▾   👤 Account ▾

GENERIC COMPANY

External Ticketing Systems

🅰 Autotask   ✎ ⏶ ☑ ⎘ 👤⁺ ☁ 🗑

| Check Groups | 🔖 All Check Groups | 🗑 |

➕ Add Ticketing System   ⏶ Collapse All   ⏷ Expand All

Currently Linked External Tickets:

This External Ticketing System channel will now be available for use with any check under your Check Central account.

Import Customers as Check Groups

CheckCentral

To create and match account-centric check groups, we'll use this new API connection to import accounts directly from Autotask.
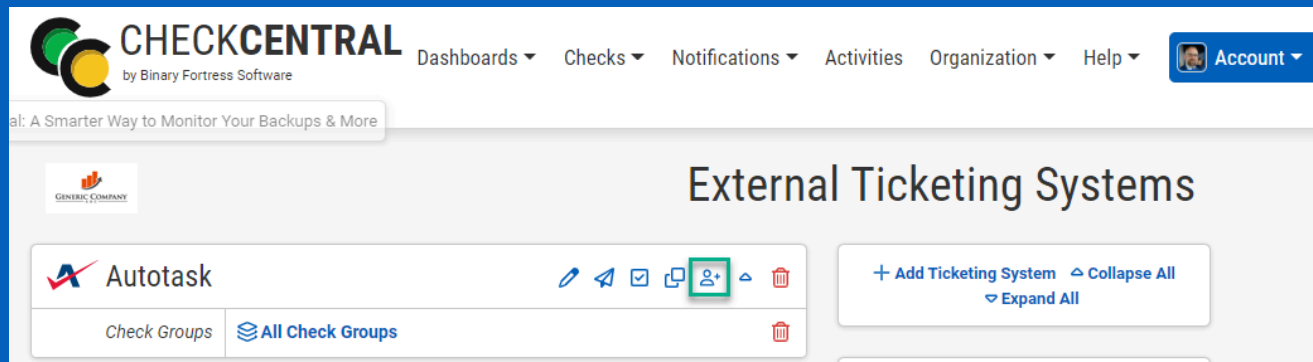
From the External Ticketing Systems page, click on the Account Import icon above your newly-created channel.

If no similar check groups exist, your accounts will be listed under Check Groups to be Created.

If you've already created Check Groups using account/customer names, they will display in the Check Groups to be Updated section, ensuring they match with Autotask.

Import Accounts as Check Groups   ⊗

Check Groups to be Created (5)   ⌃

Acme's Finest

Canada Syrup Company

Number One MSP

Top Notch

World Computers

Check Groups to be Updated (1)   ⌃

Acorn Construction

Check Groups Already Matched (-)

Notes

Clicking the import button below will commit these changes and create/update check groups as needed.

Import

Existing Groups Already Matched with Autotask will be skipped.

Import Accounts as Check Groups   ⊗

Check Groups to be Created (5)   ⌃

Acme's Finest

Canada Syrup Company

Number One MSP

Top Notch

World Computers

Check Groups to be Updated (1)   ⌃

Acorn Construction

Check Groups Already Matched (-)

Notes

Clicking the import button below will commit these changes and create/update check groups as needed.

Import

Now click Import to complete the import.

Import Accounts as Check Groups   ⊗

Check Groups to be Created (5)   ⌃

Acme's Finest

Canada Syrup Company

Number One MSP

Top Notch

World Computers

Check Groups to be Updated (1)   ⌃

Acorn Construction

Check Groups Already Matched (-)

Notes

Clicking the import button below will commit these changes and create/update check groups as needed.

Import

About CheckCentral

CheckCentral Monitoring consolidates and simplifies backup, system, and software email updates into a clean, graphical dashboard, bringing peace of mind to IT administrators of SMBs, Enterprises, and MSPs.

To learn more about CheckCentral, visit: **https://www.checkcentral.cc**

About Binary Fortress Software

Binary Fortress has spent 17 years in pursuit of one goal: create software to make life easier. Our software ranges from display management and system enhancement utilities to monitoring tools and digital signage. IT administrators, professional gamers, coffee-shop owners, and MSPs all rely on Binary Fortress to make their days better, and their lives easier.

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Binary Fortress Software
1000 Innovation Drive, Suite 500
Kanata, Ontario, Canada
K2K3E7
https://www.binaryfortress.com